

Emailing Invoices

Using TempWorks, Clients can receive their invoices through email. This can save not only time and money but payments can be received faster to get the A/R balances off the books sooner.

To Email Invoices using TempWorks:

Set up the Customer for Email Invoices:

Within the Customer/Department record set up an Invoice Email Address:

The screenshot shows a software interface with three tabs: 'Visifile', 'Address', and 'Invoicing'. The 'Invoicing' tab is active. Below the tabs is a 'Refresh' button. The main area is divided into two sections: 'Invoicing' and 'Separate invoice'. The 'Invoicing' section contains the following fields:

- Style: InvoiceTworks (dropdown)
- Invoice Count: 3 (dropdown)
- Column Type: \$ (dropdown)
- Invoice Method: Print and Email (dropdown, highlighted with a red box)
- Inv Email Address: dwood@tempworks.com (text field, highlighted with a red box)

The 'Separate invoice' section contains the following fields:

- Dept:
- Alident:
- Week-End:
- Cost Center:
- PO:

Make sure the proper Invoice Style is selected if a pdf is desired.

Indicate in the Invoice Method whether the Invoice should be Printed, Emailed or Both.

Enter the Invoice Email address.

If a Contact also wants to be included in Emailed Invoices:

Within the Contact/Address form:

The screenshot shows a 'How to Reach' section with the following fields:

- EmailInv: (checkbox, highlighted with a red box)
- E-mail: mkramer@tempworks.com (text field)

Click your mouse in the EmailInv field so a check mark appears.

After Invoices have printed the Email Invoices can be processed and sent:

Within the Invoice Run/Actions tab click on Create Invoice Email Run.

Desc	SeeCtxns	Actions	Invoices
<i>Invoice processing, printing and posting to A/R</i>			
<i>Invoice Processing</i>			
Set invoice number	Print invoice restart	Post invoices to AR	
Process invoices	Print invoice specific	Create Invoice Email Run	

This will direct you to the Invoice Email Run Form and open an Email Run for you:

▶*	▶	InvEmailRun # Lkp: <input type="text"/>	View Active Runs	19 dwood (03/05/06)	19
WeekendBill Lkp: <input type="text"/>					
Email	ProofInvoices	Template	Directory	Switchboard	
Email Info: EmailTemplate: <input type="text" value="Training Template"/> Refresh Subject: <input type="text" value="Testing Email Invoice"/> SendSepEmail <input type="checkbox"/> Return Email: <input type="text" value="ntran@tempworks.com"/> IsHtmlFormat <input type="checkbox"/> Please see the included invoices. High Tech Staffing Accounts Receivable Dept		Actions: Choose InvoiceRun(s) Create InvEmail Template Staging and Data Check Update InvEmail Template Email Invoices Post Non-Email InvoiceRuns Post Email Invoice Run Abandon Invoice Email Run			
Invoice File Configuration: FileFormat: <input type="text" value="PDF"/> BackupDir: <input type="text" value="C:\TempWorks\InvoiceEmailer\TestInvoice\Backup"/> EmailNotes: <input type="text"/>		Display: <input type="text"/>			
		Status: InvEmailRunID: <input type="text" value="19"/> # InvoiceRuns: <input type="text" value="0"/> WeekendBill: <input type="text" value="03/05/06"/> # Invoices: <input type="text" value="5"/> DateProofed: <input type="text" value="03/13/06"/> # Recipients: <input type="text" value="5"/> DatePosted: <input type="text"/> # EmailedSuccess: <input type="text" value="0"/> Abandoned: <input type="text"/> # Errors: <input type="text" value="0"/> Created: <input type="text" value="03/13/06"/> RepName: <input type="text" value="dwood"/>			

Email Info:

Email Info:	
EmailTemplate: <input type="text" value="Training Template"/>	Refresh
Subject: <input type="text" value="Testing Email Invoice"/>	SendSepEmail <input type="checkbox"/>
Return Email: <input type="text" value="ntran@tempworks.com"/>	IsHtmlFormat <input type="checkbox"/>
Please see the included invoices. High Tech Staffing Accounts Receivable Dept	

Using the Email Template dropdown, select the Template you would like to use for this Email Run.

The Subject and Text can also be manually entered.

If the Emailed Invoices should go out as "blind" click your mouse in SendSepEmail so a check mark appears. Instead of recreating the file, TempWorks will send separate emails.

If the Emailed Invoices should be sent in Html Format click your mouse in IsHtmlFormat so a check mark appears. By checking this the font can be changed.


Invoice File Configuration:

Invoice File Configuration:

FileFormat:	PDF
BackupDir:	C:\TempWorks\InvoiceEmailer\TestInvoice\Backup
EmailNotes:	

Indicate the file to be used to back up the information in the Backup Dir dropdown.

Add any additional notes within the EmailNotes field.

 If a Template is used, changes can be made to the defaulted information.

Template Changes:

If any changes are made to a Template within a specific Invoice Email those changes will not be automatically saved. If the Template needs to be updated with the changes made click on the Update Inv Email Template button within the Invoice Email Run form/Email Tab:

Actions:

Choose InvoiceRun(s)	Create InvEmail Template
Staging and Data Check	Update InvEmail Template
Email Invoices	Post Non-Email InvoiceRuns
Post Email Invoice Run	Abandon Invoice Email Run

Proof Emails before Sending:

To proof Emails:

Actions:

Choose InvoiceRun(s)	Create InvEmail Template
Staging and Data Check	Update InvEmail Template
Email Invoices	Post Non-Email InvoiceRuns
Post Email Invoice Run	Abandon Invoice Email Run

By clicking on Staging and Data Check, TempWorks will verify all recipients have email addresses.

To proof additional information click on the Proof Invoices tab:

Search:
CustName: Find
DeptName:

Data Integrity Check
Refresh

Recipient List:

Sel	Mal	EmailAddress	RecipientName	Sent	SrcType
<input checked="" type="checkbox"/>	<input type="checkbox"/>	dwood@tempworks.com	Crom Equipment		Customer ->
<input checked="" type="checkbox"/>	<input type="checkbox"/>	dalyce@tempworks.com	Mason, Joseph		Contact ->

Record: 1 of 2

CustomerName	DeptName	Invoice Number	Excl	Ignr	Err	Error Message	Sent
Crom Equipment	Primary	43109	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Cust AR
Crom Equipment	Primary	43110	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Cust AR
Crom Equipment	Primary	43111	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Cust AR
Crom Equipment	Primary	43112	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Cust AR
Crom Equipment	Primary	43113	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Cust AR

Within the Proof Invoices tab by clicking on Data Integrity Check will verify each recipient has an email address.

The Recipient List will list all recipients for the Invoices listed.

Also, all Invoices to be emailed in this run will be displayed. Navigate to the Customer record or the Invoice by clicking the navigational buttons.

Actions:

Choose InvoiceRun(s)	Create InvEmail Template
Staging and Data Check	Update InvEmail Template
Email Invoices	Post Non-Email InvoiceRuns
Post Email Invoice Run	Abandon Invoice Email Run

Display:

Status:

InvEmailRunID	19	# InvoiceRuns:	0
WeekendBill:	03/05/06	# Invoices:	5
DateProofed:	03/13/06	# Recipients:	10
DatePosted:		# EmailedSuccess:	0
Abandoned:		# Errors:	0
Created:	03/13/06	RepName:	dwood

To send the Invoices click on Email Invoices.

To post the Email Invoice Run click on Post Email Invoice Run.

The Display field will display the status of the Email as it is being sent.

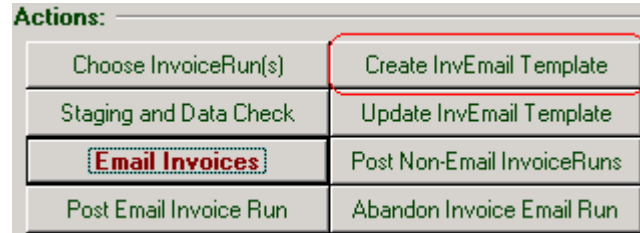
The Status area will display various information regarding this Email Invoice Run.

Additional Helpful Information

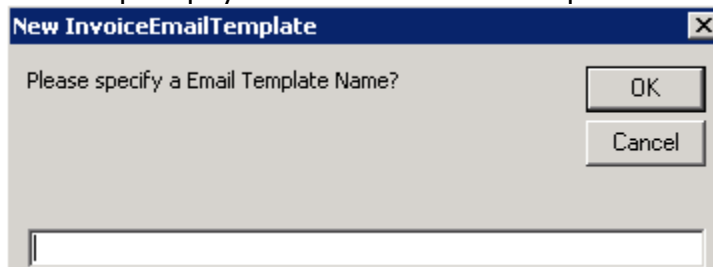
Templates:

Different Templates can be set up to be used when emailing Invoices:

From the Email Invoice Run click on Create Inv Email Template button.

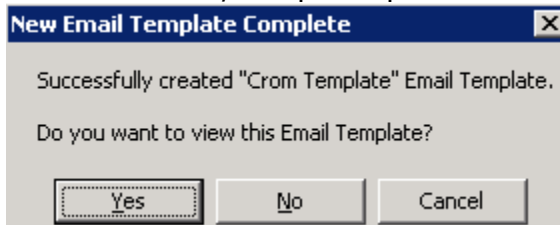


This will prompt you to enter an Email Template Name.



Once the name is entered click OK.

Click Yes to view/set up the specifics of the Template:



Within the Invoice Email Template defaults can be set:

Template	TagList	InvEmailRun	Directory	Switchboard
Email Info: TemplateID: <input type="text" value="6"/> <input type="button" value="Refresh"/> TemplateName: <input type="text" value="Crom Template"/> Subject: <input type="text" value="Web Invoice Statement # [InvoiceNumber]"/> Return Email: <input type="text" value="ntran@tempworks.com"/> <input type="text" value="[CompanyName] Invoices for week ending [InvoiceBill]"/>		Description: <input type="text" value="Template used for all of Crom's invoices"/> <input checked="" type="checkbox"/> Active <input type="checkbox"/> SendSepEmail <input type="checkbox"/> Default Template <input checked="" type="checkbox"/> IsHtmlFormat Invoice File Configuration: FileFormat: <input type="text" value="PDF"/> BackupDir: <input type="text" value="C:\Documents and Settings\dwood\"/> EmailNotes: <input type="text"/> Created: <input type="text" value="03/13/06"/> RepName: <input type="text" value="dwood"/> Updated: <input type="text" value="03/13/06"/> UpdatedBy: <input type="text" value="dwood"/>		


Email Info:

Enter the Subject line for the Template.
Choose the default Return Email address.
Enter the Text as it should appear on the Email.

Description:

Enter a description of the Template.

If this is an actively used Template make sure a check mark appears in the Active box.

 Once a Template is no longer being used, click to remove the check mark from the Active box.

If this Template should be a default click in the Default Template box so a check mark appears.

If this Template should default to Html format click the Is Html Format box so a check mark appears.

Invoice File Configuration:


Select a Back Up directory where the back up email should be saved.


Enter any miscellaneous notes in the Email Notes field.

Tag List Tab:

Template	TagList	InvEmailRun	Directory	Switchboard			
Invoice Email Merge Tag List Refresh							
* Please note that these tags will be merged with the Subject and Message Body with each email sent. * These tags are coded specifically for the Invoice Emailer and will require customization to change.							
Act	TagName	Description	TableName	ColumnName	TagGroup	Created	RepName
<input checked="" type="checkbox"/>	[BranchName]	BranchName (Abr.)	Branch	BranchName	Branch	08/07/05	ntran
<input checked="" type="checkbox"/>	[BranchFullName]	Branch Full Name	Branch	BranchFullName	Branch	08/07/05	ntran
<input checked="" type="checkbox"/>	[BranchFullAddress]	Branch Full Address	Branch	Address	Branch	08/07/05	ntran
<input checked="" type="checkbox"/>	[BranchPhone]	Branch Phone Number	Branch	Phone	Branch	08/07/05	ntran
<input checked="" type="checkbox"/>	[CompanyName]	Company Full Name	Employer	CompanyFullName	Company	08/07/05	ntran

Within the Tag List Tab there are examples of how to enter data to create merges within the Email.

 The Tags will merge with the Subject and Message Body within each Email sent.

 The Tags are coded specifically for the Invoice Email and will require customization to change.